

TGUI 3031 – Tour Planning & Management

**Pre – Tour Preparation
Lecture Notes**

PRE-TOUR

- The reservations process begins the moment the public or potential clients made aware of a **tour**, **whether it be through a brochure, flyer, word of mouth or previous experience** of a client.
- In a large tour operation, **reservations are so complex** that a separate, autonomous reservations department is formed which then reports to the general manager, president, or owner.
- There may be a **reservations manager** as well as an automation or systems manager who is in charge of the automated reservation system (RS). In a large tour operation the reservationists may be processing reservations from several sources:

TOURS

1. *The individual client* (for public tours)
2. *Travel agents* (for public tours and group departures)
3. *Group leaders* (for group departures)
4. *Tour operators* (for group and public tours)
5. *Corporations* (for incentive tours and company outings)

Public Tours

- The needs of each of these types of clients vary drastically, as does the entire process for pre-formed group versus public tours.
- Regardless of the type of client, reservations is a process that has six distinct functions which must be completed correctly for a client to be served properly.
- The functions are presented for the automated reservation system; however, in a manual system the steps would be similar but more time consuming

1. Receiving the initial inquiry

A phone call or written request is received by a reservationist. **The reservationist needs certain information (called transactional data)** from the prospective client before the inquiry can be processed:

- Tour name and/or number, departure/return date
- Name of tour member party, number in party
- Types of accommodations requested (two couples could be traveling in one room, quad occupancy, or two rooms, each with double occupancy)
- City of origin (a fly/coach tour will have different rates depending on airfares from the tour member's city of origin)

2. *Equating inquiry with availability*

- An exact match **between the client's needs and availability** is sought **by the reservationist**. The search is quite quick in the case of an automated system, and more lengthy in the case of a manual system because **the reservationist** would have to access the tour file and thumb through it for availability.
- If an exact match exists, **the reservationist would move on** to the next step.
- If the requested tour is sold to the maximum, **the reservationist can present** alternatives to the potential client, such as various departure dates, or perhaps a shorter or longer tour.

3. *Creating the account / asking for the reservation*

- A **salesperson** must ask for the sale in order to receive a potential customer's business.
- A properly **trained reservationist** *is* a salesperson because he/she is the primary tour company representative to the client.

4. *Recording the reservation data*

- Assuming that the potential customer wants to make a reservation, the **reservationist** *records the transactional data*. Some transactional data are provided by the computer (or in the manually prepared file) in order for the reservationist to inform the client (e.g., date deposit due). For repeat clients in an automated system, most transactional data are stored and accessed at this time. **Full reservation data**, when added to the inquiry data, **make up the reservation file for each client and include:**
 - Address and phone number of client(s)
 - Method of payment, plus fields for approval codes and credit card numbers
 - Date of first deposit due
 - Release date (date a reservation will be added back to inventory if no reservation is received)
 - Pickup point/departure point
 - Flight information (if applicable)

5. Confirming the reservation

An automated system usually **generates a confirmation number** and is sometimes set up to generate written confirmations. When written confirmations are sent, the process is usually completed when it is convenient to insert the preprinted forms into the computer's printer.

Some tour operators use **more complicated contracts** rather than simple confirmations. **An itinerary** would also accompany the confirmation or contract.

6. Maintaining the Customer Account

- The **customer file** or record readily accessed for changes, records of deposits and payments, and cancellations. **The reservation data serve as a critical link between** the reservations and customer accounting processes.

Customer Accounting

- In many cases, for instance in the sale of manufactured goods, **the point of sale** occurs simultaneously with the exchange of cash or credit for goods.
- The tour industry, for the most part, does not follow **this point-of-sale rule**.
- Production and consumption occur simultaneously, and if payment also occurred simultaneously, **it would be extremely difficult** for tour operators to plan tours in advance.
- Therefore, **guest accounts and payments** are usually made *in advance* instead of being made when the experience occurs. **Payments and deposits** are made in advance because it is important for tour operators to advance the appropriate deposits to

Types of Deposits

- Many tour operators require a deposit of some sort at the time of booking as "**good faith**" that the customer intends to take the tour.
- This **reservation fee** may or may not be refundable. In addition to a reservation fee, the client usually pays a first and a second deposit.
- **The first deposit is** most often refundable to a certain point in time, usually 21 days to 60 days.
- **A second, larger deposit is** usually required of per capita tour clients and ranges depending on the cost of the tour, but averages 50 percent of the total tour cost.
- **This deposit** is usually required 45 to 90 days in advance. **Full payment is** due from 14 to 45 days in advance, and at this point may be nonrefundable.
- **Pre-formed group deposits are** handled in a similar fashion, but sometimes the 50 percent second deposit is waived.

- A second type of deposit, called a **rollover deposit**, is sometimes used by hotels that have multiple bookings from a tour operator for a series of tours. **The hotel might normally require \$100 per tour arrival to hold the rooms, but if the operator booked.**
- 10 arrivals, the hotel might accept \$500 total. \$50 would be on **deposit for each tour**. When tour 1 arrives, the hotel rolls the \$50 deposit over to tour 2 and requires full payment from tour 1 without the \$50 credit.
- There are **several other ways of accomplishing** a similar end result, all devised as attempts **by hoteliers and other suppliers** to have the flexibility that tour operators need to run their businesses properly.

Routine Updates with Suppliers

- After the tour has been booked with a hotel or restaurant, **the tour operator usually receives** menus from which to choose a tour's meals.
- It is important that menus be varied, and therefore **it is also important to have in writing** every component or course of each meal.
- All of the menus from suppliers **need to be reviewed** before any menu should be firmed up with a supplier. If **a welcome reception is planned for each hotel**, attempt to vary the menus ever so slightly so that the reception does not become mundane.

Routine Updates with Suppliers

- As time goes by, **hotels will have to be contacted** to let them know how the occupancy patterns are evolving (the number of singles, doubles, triples, and quads required).
- **By way of example**, let's say that a group brochure offers a tour of Washington, DC. **The first group** to book is a senior-citizen group. **The second group** is a Girl Scout troop.
- Twenty-five rooms **have been blocked on speculation** for each group. **As time goes on, the tour operator might realize that youth groups tend to travel in quads, while senior citizens tend to travel in pairs** (but requiring rooms with two double beds).
- Even if **both groups arrive with 45 people**, the senior group will require 23 rooms plus driver, group leader, and escort, the troop will require 11 or 12 rooms, plus driver, group leader, and escort.

Routine Updates with Suppliers

- It would be a **courtesy to the hotel to let them** release the extra rooms **as soon as** the nature of the group is understood.
- It is **also a good idea** to communicate to youth groups as soon as possible, because some hotels charge security fees or require a certain number of adults to accompany the group.
- In general, it is **always a good idea** to keep in touch with suppliers at a minimum of 45 days out from the departure date, to notify all the suppliers how the tour is coming along.
- Assuming that deposits have been forwarded, there **should be no risk of cancellation**; however, you might just want to touch base so that your tour is well protected.

D MANIFESTS

- A hotel's ultimate pre-tour concern is **the rooming list**, which states, according to the tour operator, which customers are rooming with which, which need one bed or two, and who requests first floor, near elevator, or connecting rooms.
- The hotel usually has its **own form** which is mailed to the tour operator; however, many tour operators also have their own forms, which are perfectly acceptable.

D MANIFESTS

- **Rooming lists** are one of the major service problems that hotels have when dealing with tours. The front office requires **the rooming list** 2 to 3 weeks in advance.
- Rooms not accounted for on **the rooming list** will be released back into the hotel's inventory.
- Tour operators are hesitant to send **the rooming lists** on *light* tours because they would like those 2 to 3 weeks to continue to sell space on the tours—**hence the conflict between the hotel and the tour operator.**

The Flight Manifest

- For tours involving air travel, a **flight manifest** will be due 3 to 4 weeks in advance.
- A **flight manifest lists** the travelers in alphabetical order: last name, first initial.
- **Flight manifests** used to be prepared by the categories of smoking and nonsmoking, but this is no longer necessary on most domestic flights. **International flight manifests** require the legal name (first and last) plus smoking preference.

Routing and Other Details

- **A great deal of routing information** should be completed during the itinerary planning stage.
- Updates of road construction, detours, and street directions can be **covered at this time.**
- **Complete instructions** should be compiled for both the driver. (for motorcoach tours) and tour director/escort. If the tour was appropriately priced, utilize step-on or daily guide service in those hard-to-navigate areas.
- **Communication** is the key to proper tour execution, but **proper communication** takes planning.
- **Few problems can create** greater tour execution disasters than poor routing. If chartering a motorcoach from a transportation company, **do not assume** that the driver will have detailed directions regarding your destination. **The tour operator is,** under most circumstances, responsible for routing.

Tour operators use

- the same principles when assigning **directors/escorts** to tours.
- Determining who is trained in which destinations, who is available, who is coming off two back-to-back tours, is **a very complex process and requires** that both the operator and director/escort maintain some flexibility.

- **How to Complete Driver and Escort Schedules**

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- **A tour operator must** attempt to maintain maximum flexibility so that each client receives the best possible service.
 - For both drivers and escorts **the tour operator should** compile a chart that outlines each employee's level of training and experience.

Escort training usually takes tour management

- **Tour management training can be** taught to groups of escorts in training by an experienced trainer.
- **Tour management skills include** the administration of daily paperwork, negotiating with suppliers, routing skills, personality and leadership skills, handling emergency situations, and other training deemed necessary by the tour operator.

The level of escort training and other manuals varies from tour operator to tour operator but should include at least most of the following:

- Detailed driver and escort itineraries
- Detailed routing information
- Phone numbers, addresses, brochures, and contact names of all suppliers
- A supply of checks (if necessary) for escort to pay some of the charges

A geographical survey of destinations and areas enroute

- Some information on flora and fauna
- Some educational/historical/cultural information
- Information on cross-selling other tours in the product/service mix
- Emergency numbers in all destinations
- A telephone number where the responsible operations person can be reached 24 hours per day

Internal Communication

- **The tour operation** in the heaviest of the pre-tour phase can be **quite a stressful environment**. One of the most crucial problems seems to be **the lack of traceable work**.
- **Internal communications involves** completing work that is "idiot-proof," or 100 percent traceable. This means that all work can be traced to **source documentation**, price quotes can be justified, and promises to clients are noted and followed through.
- **Tracing work** (cross-referencing so that anyone can find your source) is time consuming and most people tend to avoid it because it is tedious work.
- However, **when tour execution begins**, there will be no time to run around frantically. Set up systems in the pre-tour phase so that problems that directly affect client satisfaction can be avoided. **Communicate properly with peers, subordinates, and supervisors.**